

Workplace Health Assessment Data Matrix

\* TOWE - Tool for Observing Worksite Environments available at: [http://www.cdc.gov/nccddp/dnpao/hwi/downloads/swat/SWAT\\_observing\\_worksite\\_environment.pdf](http://www.cdc.gov/nccddp/dnpao/hwi/downloads/swat/SWAT_observing_worksite_environment.pdf)

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		Interviews					Site Visit	Other Data	Interviewee Response(s)/NOTES:
		Senior Management (e.g. CEO, Vice-President) [VP]	Program Managers, Supervisors [S]	Human Resources Staff [H]	Environmental Health and Safety Staff [EHS]	Employees, Employee Committee Members (e.g. Wellness) [E]	Environmental Assessment (TOWE)*	HR/ Employee Data/ Program/Vendor(s)	
<b>I. INTRODUCTION</b>									
1	Could you begin by telling us a little more about yourself? What's your role at <Organization Name>?	X	X	X	X	X			
1a	What's your job title?	X	X	X	X	X			
1b	What are your primary responsibilities?	X	X	X	X	X			
<b>II. PROGRAM ADMINISTRATION AND MANAGEMENT</b>									
<b>A. Health Program Benefits or Potential Benefits</b>									
2	Why are you interested in health promotion activities at <organization>?	X	X	X					
3	What do you see as the benefits of a health program to your organization?	X	X	X	X	X			
3a	What do you (envision/see) as the program benefits for employees?	X	X	X	X	X			
3b	What makes you (interested in/willing to) support the program?	X	X	X	X	X			
4	What do you see as the common health issues impacting employees at <organization>?	X	X	X	X			Employee Health Survey Injury data Attendance data	
4a	What are the biggest drivers of employee health care costs at <organization>?			X				Health Claims Worker's Comp / Disability / Injury Data	
<b>B. Program Implementation and Goals</b>									
5	Does your organization have a document (e.g., a mission or corporate values statement) that refers to improving employee health?	X	X	X				Policy Manual	
6	Does your organization have annual objectives for wellness (committee, departmental, individual)?	X	X	X					
7	Does your company maintain membership or participate in any wellness or health council (external)?			X					
8	Could you tell me the types of program activities you would be interested in seeing implemented in a health program?	X	X	X	X	X			
9	What would you see as the overall goals of a health program?	X	X	X	X	X			
9a	How do you foresee a program impacting the work environment?	X	X	X	X	X	X		
9b	How would a program impact the health and safety climate?	X	X	X	X	X	X		
9c	What benchmarks do you expect to reach in the next 6 months to one year? How about the next 1-3 years?	X	X	X	X	X			

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10	What department do you think would be responsible for coordinating/running the program?	X	X	X					
10a	How would such a program be administered and managed?	X	X	X					
10b	Would this person have the authority to run the program?	X	X	X					
10c	Would this person be accountable for program success, to whom?	X	X	X					
10d	What is your company's current situation with regard to a wellness or health program/committee?	X	X	X					
10e	Who do you think are/would be good program champion(s)?	X	X	X					
10f	How active in the program do you feel senior leaders will be?	X	X	X					
<b>C. Program Costs</b>									
11	Does your company have an operating budget for health promotion activities?	X		X					
<b>Optional Questions (A-D): Program Costs</b>									
A	Tell me about staffing the program, who are the core staff involved?	X		X				Program / Vendor Data	
B	How would you describe the operating costs for the program?	X		X				Program / Vendor Data	
C	What will the start up costs be for the program (e.g., any one time costs such as equipment purchase, consultant fees, etc.)?	X		X				Program / Vendor Data	
D	Does your organization assess cost-effectiveness of its health promotion efforts?	X		X				Program / Vendor Data	
<b>D. Program Eligibility, Promotion, and Communications</b>									
12	Who is likely to be eligible to participate in the program? Are there specific employee groups that you would like to reach (target)? Why?	X		X					
12a	Would the program also serve spouses, dependents, or retirees?	X		X					
13	What do you think are the best places/ways to provide employees information about health initiatives?		X	X	X	X	Information environment		
13a	Other than during open enrollment, does your company communicate with employees about health, health behaviors, chronic disease prevention, health and safety risks, and/or preventive services? If so, how often?		X	X	X	X		Program / Vendor Data	
13b	Which of the following avenues are used within your organization to communicate information to employees (intranet/website, e-mail, newsletter, bulletin board, payroll stuffers, mailings to employees' home, other)?		X	X	X	X	Information environment		
13c	What do you find [which of the above] is the best way to reach employees?		X	X	X	X			
<b>E. Employee Wellness Committees</b>									
14	I am interested in learning about the structure and functioning of the <insert name> committee.				X	X			

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14a	Who participates in the committee? Does it include both employee and management representatives? How do you work across organizational units (Business units or departments within a business unit)?				X	X			
14b	Are employee representatives (e.g., unions) formally or informally involved in the wellness committee or workplace health program?				X	X			
14c	How often does the committee meet?				X	X			
14d	Does the committee have a budget? How much is the budget?				X	X			
14e	How do you plan your annual activities? Do you set goals? How do you set priorities?				X	X			
15	What kinds of issues does the committee address?				X	X			
15a	What kinds of planning activities does the committee engage in?				X	X			
15b	What kinds of education activities does the committee engage in?				X	X	Information environment		
15c	What kinds of changes to the workplace environment have you suggested?				X	X	X		
<b>F. Employee Health and Safety Committees</b>									
16	What health and safety risks are present? What do employees perceive as health and safety risks?				X	X	X		
16a	How are they monitored?				X	X			
16b	What is being done to address them?				X	X			
16c	What challenges has the committee needed to address to improve workplace safety?				X	X			
16d	What has proved particularly helpful addressing barriers?				X	X			
17	What involvement, if any, has the committee had with workplace health promotion?				X	X			
18	How feasible would it be for the committee to help plan workplace health programs?				X	X			
18a	What (other) type of committee might you suggest?				X	X			
19	What have you learned from your experience on the committee that would provide useful lessons for an advisory or employee committee to address health promotion?				X	X			

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<b>III. PROGRAM AND SERVICES</b>											
<b>A. Worksite Health and Health Promotion Services</b>											
20	<p>We'd like to learn more about the activities and practices &lt;organization&gt; currently has to support employee health. What programs do you offer? In the past year, has your company organized or sponsored a program for employees in any of the following areas:</p> <p>a) Tobacco cessation b) Nutrition programs c) Physical Activity programs d) Vaccination programs e) Mental health programs or Stress and Work/Life balance f) Programs to screen and treat alcohol misuse g) Injury prevention programs h) Disease Management i) Programs to support breastfeeding j) Health and Safety k) Other programs?</p>		X	X	X	X	Building Fitness Center Occupational Health Clinic Nutrition environment Community	Program/Vendor data			
20	<p><b>[If a: Tobacco Cessation services = Yes].</b></p> <p>l) What, if any, smoking cessation services does &lt;organization&gt; offer? m) Does &lt;organization&gt; offer Over-The-Counter (OTC) Nicotine Replacement Therapy (NRT like the patch) to smokers who are trying to quit? Is there any out of pocket cost to employees?</p>			X				Health Claims Program / Vendor Data			
<b>Optional Questions (E-H): Tobacco Cessation Services</b>											
E	Does your company or a contracted vendor provide referrals to employees for tobacco cessation assistance (e.g., phone numbers to state telephone quitlines, or information for local counseling services)?		X	X	X	X		Program/Vendor data			
F	Does your company provide an employee telephone tobacco cessation quitline? Is it available to dependents?		X	X	X	X		Program/Vendor data			
G	Does the quitline service report measures of effectiveness, including utilization and long-term (6 months or longer) quit rates?		X	X	X	X		Program/Vendor data			
H	Does your company allow employees to use the quitline service while at work (outside of lunch breaks or other scheduled breaks)?		X	X	X	X					
21	<p>Does &lt;organization&gt; offer any of the following preventive health services at the worksite:</p> <p>a) Flu vaccine b) Pneumococcal vaccine c) Mobile mammography d) Blood pressure screening e) Cholesterol screening (lipid profile) f) Blood glucose screening g) Stress test, etc.</p>			X				Program/Vendor data			

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<b>B. Training, Education, and Support</b>									
22	Does <organization> provide training or resources to employees on medical consumer issues?			X				Program/ Vendor data	
23	Does <organization> engage in decision-support practices to inform employees on their treatment options, risk and benefits?			X			Information environment	Program / Vendor Data	
<b>Optional Questions (I-N): Health Program Offerings</b>									
I	Does your program promote support groups or buddy systems for employees trying to improve their health through company supported health promotion/wellness programs?			X					
J	In the past 12 months, what has your organization done regarding a health promotion campaign specifically targeting health behaviors?			X			Information environment	Program/ Vendor data	
K	Does your company offer disease management programs?			X				Program/ Vendor data	
L	Does your company offer work/life balance programs (including stress management skills training)?			X				Program/ Vendor data	
M	Does your company offer education programs on self-care or lifestyle management?			X				Program/ Vendor data	
N	Does your company offer education or training programs on injury prevention; safety; identification, reporting, and eliminating workplace health and safety hazards?			X			Information environment	Program/ Vendor data	
<b>C. Assessment and Data Management</b>									
24	Does <organization> conduct any of the following surveys or assessments? a) Health Risk Appraisal b) Health Screening c) Physical fitness assessments d) Employee health interests survey e) Work/family needs assessments f) Ergonomic/work station analysis g) Facility assessment h) Absenteeism records i) Disability claims j) Workers compensation claims k) Injury reports l) Job satisfaction (e.g., Employee Engagement Survey) m) Safety surveys or inspections			X	X			Program/ Vendor data	
24a	How often does this occur? When and where do they occur (e.g., during work time)?			X	X			Program/ Vendor data	
24b	How do you collect survey responses? -- Census (i.e., all employees) -- RANDOM SAMPLE -- Convenience Sample			X	X				
24c	What is the response rate?			X	X			Program/ Vendor data	

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24d	Who typically looks as this information to decide what actions to take based on it?			X	X				
25	What kinds of evidence or data convince you that the program is worth the time and effort devoted to it?	X	X	X	X			Program/ Vendor data	
25a	Where does the information come from?	X	X	X	X				
25b	How often do you get it?	X	X	X	X				
25c	How much confidence do you have in the information?	X	X	X	X				
25d	How useful is it (would it be) to you to have data like this?	X	X	X	X				
<b>D. Program Suggestions</b>									
26	What would you suggest to create or provide to strengthen the program?	X	X	X	X	X			
27	Tell me about the types of program activities you would be interested in seeing implemented in [a workplace health/an enhanced workplace health] program.		X	X	X	X			
<b>IV. POLICIES</b>									
28	What kind of policies does <organization> have to support employee health?		X	X	X	X		Policy Manual	
<b>A. Screening Policies</b>									
28a	What kinds of policies do you have related to health screening?		X	X		X		Policy Manual Health Plan	
28a-1	Does your company have a policy such as flex time that enables all employees to obtain preventive medical services during the week without using sick time?		X	X		X		Policy Manual	
28a-2	Does your company provide paid time off from work specifically for preventive services and screenings?		X	X		X		Policy Manual	
<b>B. Nutrition Policies</b>									
28b	Does <organization> currently have any nutrition policies in place? If yes, what are these?		X	X		X		Policy Manual	
28b-1	Do your company worksites adhere to catering guidelines that state healthy foods will be provided at meetings or other employee events?		X	X		X		Policy Manual	
<b>C. Physical Activity policies</b>									
28c	Does <organization> have any written policy that encourages fitness standards for certain positions?		X	X	X	X		Policy Manual	
28c-1	Do you allow employees to exercise during work hours?		X	X	X	X		Policy Manual	
28c-2	Does <organization> have a policy such as flex time that enables all employees to participate in physical activity or health promotion programs during the week without using sick hours?		X	X	X	X		Policy Manual	

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<b>D. Tobacco policies</b>									
28d	Does <organization> have any written policy restricting employee tobacco use? If yes, how are they enforced?		X	X		X		Policy Manual	
28d	How would you describe the current tobacco policy? 1) No policy on tobacco use in place 2) Employees and visitors are allowed to smoke in designated areas of the building 3) Employees and visitors are allowed to use tobacco on the premises (including vehicles) but not inside the building 4) Employees and visitors are banned from using any form of tobacco throughout the premises; this includes company grounds and vehicles 5) Does your company have a written policy to prohibit smoking at company-sponsored events (both on-site and off-site)? 6) Does your company prohibit the sale of tobacco products anywhere on the premises (vending machines, on-site store, etc.)?		X	X		X	Building Grounds Parking Lot	Policy Manual	
<b>E. Other Policies</b>									
28e	Does your company promote any other health promotion policies such as seat belt use, injury prevention and safety, hand sanitation, alcohol and substance use, etc.? If yes, tell me about these.		X	X	X	X		Policy Manual	
<b>Optional Questions (O-Q): Policy</b>									
O	Do any of your company's employees work primarily outdoors?		X	X	X	X	X		
P	Does your company have a policy requiring employees to use sun protection if they are exposed to sun while on the job?		X	X	X	X		Policy Manual	
Q	Does your company provide sunscreen or protective clothing for outdoor workers?		X	X	X	X			
<b>V. EMPLOYEE HEALTH BENEFITS</b>									
<b>A. Health Promotion and Health Care Benefits</b>									
29	Does your organization offer health insurance to employees? At what level? Who is eligible? What are the co-pays for these visits?			X				Health Claims Health Plan	
30	Does your organization offer prescription coverage? What are the co-pays for prescriptions? What drugs are covered under your health plan formularies?			X				Health Claims Health Plan	
31	Do the health plan options include coverage for preventive services? At what level? What are the co-pays for these visits? How well is this utilized among employees?			X				Health Claims Health Plan	

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R	Of the employees that have health insurance, how many (%) made claims in the past year?			X				Health Claims	
S	Do the health plan options include coverage for tobacco cessation? About how many employees within <organization> have taken advantage of tobacco cessation programs? (Review benefits description)			X				Health Claims Health Plan Program/ Vendor data	
T	Do the health plan options include coverage for disease management programs, health coaching, or targeted risk reduction programs? (Review benefits description)			X				Health Claims Health Plan Program/ Vendor data	
U	Do the health plan options include any coverage for stress management? (Review benefits description)			X				Health Claims Health Plan Program/ Vendor data	
V	Do the health plan options include comprehensive coverage for chronic disease medical treatment throughout the disease episode? (screening, diagnosis, treatment, maintenance, recovery, etc.)			X				Health Claims Health Plan Program/ Vendor data	
W	Does your organization stipulate in health insurance contracts that health plans will track network provider delivery of preventive services?			X				Health Claims Health Plan	
X	In terms of health care utilization, what is the percentage of claims made for hospitalizations, outpatient visits, physician office visits, other? (Cross reference with health claims data runs)			X				Health Claims	
Y	How many employees were hospitalized in the last year? What are the primary reasons for hospitalization for your employees? How do these reasons differ by age, gender, income, geography or job description? What is the percentage of claims made for hospitalizations, outpatient visits, physician office visits, other? (Cross reference with health claims data runs)			X				Health Claims	
Z	What employee benefits are available for workers compensation or short term/long term disability?			X				Program/ Vendor data Policy Manual	
AA	Does the organization offer a membership discount for employees who go to a fitness facility? Is there an attendance requirement? About how many employees have taken advantage of this benefit?			X			Fitness Center Community	Program/ Vendor data	
BB	What benefits are extended to retirees?			X				Health Plan Program/ Vendor data Policy Manual	
32	Do health insurers conduct any outreach activities to enrollees on health promotion/disease prevention? If yes, how often? How (mailings, email, information line, etc)?			X				Health Plan	



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33	Does your organization stipulate in health insurance contracts that health plans send age-appropriate reminders to network providers about preventive care services?			X				Health Plan	
34	Does your organization stipulate in health insurance contracts that health plans report HEDIS data or other measures of health plan quality/performance? What data do they provide?			X				Health Plan	
35	Who is responsible for developing the annual benefits package?	X		X					
35a	Are there ways in which you get employee input about the benefits that are provided? (i.e., Is the health benefits package consumer driven in anyway?)			X					
36	Does your company offer an employee assistance program (EAP)? What are the services provided (including depression/mental health; weight management; tobacco use; drug/alcohol dependence; care-giving support; bereavement, other?)			X				Health Plan Program/ Vendor data	
<b>B. Incentives</b>									
37	Does <organization> provide any incentives for participation in health promotion/wellness programs?		X	X	X	X		Program/ Vendor data	
37a	Are there any incentives beyond participation? How about for meeting individual or team goals?		X	X	X	X		Program/ Vendor data	
38	Are any discounts on health insurance premiums given to nonsmokers?			X		X		Health Plan Program/ Vendor data	
38a	If yes, About how many employees within <organization> pay the higher premium because they smoke?			X		X		Health Plan Program/ Vendor data	
38b	How is this policy received? Is it seen as fair?			X		X			
<b>VI. ENVIRONMENT</b>									
<b>A. Program Barriers and Resources</b>									
39	What barriers, if any, do you see at your worksite to a healthy lifestyle or safe work environment?	X	X	X	X	X	X		
40	How feasible is it for <organization> to allow employees to take time during work hours to exercise or attend a health program such as a screening, education session, etc.?		X						
41	Are there multi-purpose rooms that are (or could be) used for classes or group activity (including physical activity in the absence of a gym, or for providing on-site health assessments like blood pressure checks?			X			Building		

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42	What environmental changes (e.g., lighting, ventilation, safeguarding machines and equipment, ergonomics, walkways, etc.), if any, has the organization made to prevent injuries or promote safety?				X		Building Grounds Parking Lot		
Optional Questions (CC-NN): Environment									
CC	How do you foresee the program having an impact on the worksite environment?		X	X	X	X	X		
Nutrition Environment									
DD	Does your organization offer on-site food services? If yes, are healthy foods available in cafeterias and vending machines?		X	X		X	Nutrition environment		
EE	Could your company subsidize/competitively price healthy food choices available to employees?	X		X				Program / Vendor Data	
FF	Where food is available, does your organization post nutritional content or health food labels on available products to help employees make healthy choices?			X		X	Nutrition environment Information environment		
Physical Activity Environment									
GG	Does your organization provide access to physical activity facilities at or near the worksite?		X	X	X	X	Fitness Center Community		
HH	Are there elevators at your worksite? [If yes] Are there signs or reminders to take the stairs?		X	X		X	Building		
Barriers									
II	What is the overall work environment like? Noise level, lighting (natural or electric), ventilation, open space, safeguarded machines and equipment.		X	X	X	X	Building Grounds Parking Lot		
Resources									
JJ	Are there conference rooms at your worksite?			X			Building		
KK	Are there First Aid kits? Respirators, fire extinguishers, other safety equipment?		X	X	X	X	Building		
LL	Is there an occupational medicine clinic or first aid station?		X	X	X	X	Occupational Health Clinic		
MM	Are there breastfeeding/lactation rooms?		X	X		X	Building		
NN	Are there quiet rooms (for stress reduction)?		X	X	X	X	Building		
VII. COMMUNITY LINKAGES									
43	How do most employees get to work? Do they typically drive? Walk? Bike? Take a bus? Is a reimbursement/subsidy given to employees for taking public transportation (as a means to increase daily physical activity)?		X	X		X	Community		
44	What is the average commuting time for your employees?		X	X		X			
45	Where do most employees eat lunch? Do they go to an on-site cafeteria? Do they bring their lunches? Do they go out for fast food?		X	X		X	Nutrition environment Community		

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46	Are there other programs available in the community that target increased physical activity and/or improved nutrition (e.g., farmers markets)?		X	X		X	Community		
47	Does your organization participate in community campaigns to promote healthy lifestyles?	X	X	X		X			
Optional Questions (OO-PP): Community Linkages									
OO	Does your organization contract with community organizations and programs involved in preventive care, healthy lifestyles, or recreation? If so, does your organization advertise these opportunities?	X	X	X		X		Program/ Vendor data	
PP	Does your organization provide employee volunteer opportunities on company time?	X	X	X		X		Policy Manual	
VIII. CONCLUSION									
48	How would you like to be involved as planning for a possible health program moves forward?	X	X	X	X	X			
49	Is there anything else about <organization> you would to add that was not reflected in the interview?	X	X	X	X	X			